

INTRODUCTION

The 2024-25 ILS evaluation process included vendor demonstrations as well as in-person and virtual visits (only Polaris) to libraries currently using the reviewed software products. Both Polaris and SirsiDynix have positive Circulation features and functionality attributes, including the following:

REFERENCE DOCUMENTS

[Circulation](#)

SYSTEM REVIEWS

Polaris

The majority of the vendor demonstrations and site visits featured Polaris Leap.

Pros

- Provides a Sandbox for testing and training.
- In the History of items checked out, the Action column includes the information that the checkout occurred on a self check. Also displays the location, staff station and username (staff login).
- Damaged Check In option.
- Refund Credit option
- Multiple Holds option (Book Group holds) – place multiple holds on one title or place holds on a number of titles at once.
- Changing an item's status to any status other than Available will remove the hold request/title from the picklist.
- Patron's hold request can be filled by a walk-in checkout (item from same BIB).
- Optional list of Pick-up area is useful – lockers, curbside, foyer, etc.
- Overdue fines can be set to be based on Checkout Library rules.
- Patron Merge functionality.
- Multiple blocks display on Checkout screen, but on the side of the screen.
- Patron hold and checkout history can be retained as far back as we want. Staff have access to both histories.
- Renewals can be set to be attributed to the original checkout library.
- Keyboard shortcuts.
- Can set the system to clear record locks in as little as 1 hour.
- Even if a bibliographic record is "locked", other staff can still add item records to the BIB record.
- Date fields are auto-formatted.
- Separate template for Transit slips.
- Single search bar for all searches: patron names & info, bib records, old barcodes. Could be a pro or con depending on how reliable it is. Advance search option available in "Find" section.
- "On-the-Fly" is their Fast-Add Bib & can be suppressed from Circulation and will be flagged during check-in process.
- Checkout Receipts allow selection of particular items or all items & includes Magazine Vol info.

- Patron Notices can be sent via all forms instead of only one: Email, Text, & Phone.
- Juvenile checkout blocks are placed on guardian as well.
- Patron Merge is documented with date & by whom.
- "Local" or "Home" item status acts like our "Local Hold" but can apply to one library or a small group of libraries such as all of MAD branches.
- Backdate option indicates when an item was checked in, but allows "free days" to reduce fine charges similar to "back date" but will retain the correct last seen date. Ex. Item will show a last seen date of 1/2/2025, but if backdate option is ON, item will record the backdate of 12/30/2024 or any other date selected to reflect correct fines.

Cons

- It appears that much of the front-line Circulation functionality is available in Leap. Information received from staff at the two site visits did indicate that some "higher-level" functionality must be performed in Polaris by staff with a "higher-level" of permissions (managers, supervisors, etc.)
- Do not like that you cannot access a patron record if someone else has it open. Can't have multiple screens without logging in again.
- Only one previous patron barcode is retained.
- Does not offer bulk changing of pickup locations (currently a development request).
- Refunds could not be cleared without it appearing as if the patron was refunded.
- Leap Offline uses a single default loan period.
- Can't archive Patron Notes.
- No specific equivalent of Date Differential for Reduced Transportation Holds functionality.
- No Claims Returned option.
- Not able to add library logo to receipts at this time.
- Can change descriptions of existing item statuses but can't add new statuses or delete unused statuses.
- Every time you open a new tab, it is retained in a list on the sidebar. Each click opens up a new tab, up to 99 tabs. These tabs remain open unless you remember to close them. Would this contribute to slowing the memory on this browser on this PC?
- Staff placing a hold on behalf of a patron are required to enter an active date when placing a hold. Can suspend for a period of time. Only patrons can suspend indefinitely.

SirsiDynix

The majority of the vendor demonstrations featured BlueCloud and Symphony Web. We were unable to find local Wisconsin sites to visit that primarily used Blue Cloud for Circulation, though SCLS staff have met virtually with various system administrators using SirsiDynix.

Pros

- Provides a Sandbox for testing and training.
- Location and Timestamp of a checked in item can be displayed in the patron Charge History if enabled.
- Cash Management reports track the location of payments accepted manually (not eCommerce).

- Symphony policies can automate whether or not a Refund is provided for a Lost, Paid and Returned item based on the Owning library's Price Policies and Price Map.
- Holds on the hold shelf can have their expiration date adjusted.
- A single member of a Family Group can see summaries of the other individuals in the group and can pay the bills for others in the Group using the Pay User Group Bills helper. Family Group includes Proxy Borrowing options.
- Patron's Hold History is retained in the Holds tab of the patron record. Holds can be filtered by owning library, pickup library, placed-at library, and type of hold (inactive, expired, all, etc)
- Local Holds can be set to apply to all branches in a multi-branch library.
- Staff access to patron reading history. A library can set permission to limit which staff login can view/edit the reading history. With the correct permission, staff can delete a specific entry (or entries) from a patron's reading history at their request.
- Can batch change a patron's hold pick-up location but has to be done in Symphony Web.
- Allows renewals on items with active holds if there are enough available items on the BIB to fill the other hold requests.
- Can print or email checkout receipt
- Can change the due date after an item is checked out.
- Blanket Holds (multiple holds) functionality looks very easy to use.
- Staff can suspend and set a Resume on date when placing a hold for a patron.
- Overdue fines can be set to be based on Checkout Library rules.
- Keyboard shortcuts in BlueCloud.
- Holds Queue report/Pick list can be configured to update in real-time as holds are placed, cancelled, suspended, or un-suspended manually throughout the day
- Date fields are auto-formatted.
- Separate template for Transit slips.
- Individual items have their own history logs of check-ins/outs and other statuses.
- Mobile Staff Offline Mode has limited circ, can add users, check in/out items, renew items. It can be used on phone/tablet/laptop. Offline Desktop Mode also available.
- Patron Barcodes can be marked as "Lost" and can be retained or discarded.

Cons

- It appears that almost all front-line Circulation functionality is available in Blue Cloud. However, the lack of site visits with dedicated Blue Cloud users means we don't know which "higher-level" functionality may require switching to Symphony.
- Merging user records is not currently available in Symphony but is on the road map for future development.
- Claims Returned function in Symphony does not credit Lost charges.
- Staff Notes on a patron record do not automatically have a location/timestamp.
- Patron's hold request cannot be filled by a walk-in checkout (item from same BIB)
- Can only view the previous patron barcode, not any prior.
- Not all blocks display on Checkout screen when patron is blocked from checkout.
- Did not indicate that an item was "Lost" at checkin.
- No specific equivalent of Date Differential for Reduced Transportation Holds functionality.

Bibliovation

We did not have vendor demonstrations or visits for Bibliovation. Assessments are based on our current experience of the software.

Pros

- Provides a Sandbox for testing and training.
- Completely browser-based and hosted in the cloud.
- Claims Returned functionality - credits Lost charge.
- Patron Edit History. No cap on data retention.
- Reading/Checkout History accessible to staff.
- Holds History and Messages History easily accessible.
- Advance Patron Search.
- Borrower Cart - batch editing of patron records.
- Can have multiple tabs open for a patron record - one same or different PCs. No "record-lock".
- Retains all Previous Cardnumbers for a patron record.
- Renewals are attributed to the original checkout library.

Cons

- Old bugs not fixed. Local Holds functionality is still partially broken in 7.02 but fixed in 7.04.
- Patron's hold request cannot be filled by a walk-in checkout (item from same BIB)
- No pop-up at Check in to warn of a Fast Add record.
- Phone number fields are not auto-formatted.
- Date fields are not auto-formatted.
- Staff are not able to enable or disable Reading History on behalf of patrons.
- Some fields are not copied over when staff add a Child's record from the Adult's record or copies a new Adult record from the first. Specifically, Messaging Preferences and sort1 (PSTAT) fields for juvenile records.
- All fines owed by members of a Patron Group cannot be paid by a/from a single patron account.
- Inventory functionality is not useful for our libraries.
- Multiple Items statuses fields are confusing and clunky to work with.
- Ongoing problems with Custom Item statuses not being cleared when items with those statuses are checked in using a sorter.
- Financial transactions are not as linear as we would prefer and are often confusing to read and understand.
- Cancelled holds STILL remain on the Holds Awaiting pickup (pull list) report for seven days after being checked in.

RECOMMENDATION

Polaris and SirsiDynix both demonstrated increased functionality in their browser-based interfaces - Leap and BlueCloud. The Workgroup delineated pros and cons for all products reviewed, including the positive benefit of having User Groups containing other libraries and systems within Wisconsin. While both Polaris and SirsiDynix are planning adding development for additional access and functionality within the browser-based interfaces, there are concerns about certain aspects of the functionality within Polaris Leap that the workgroup felt would not be a good fit for our system's needs.

At this time, the ILS Evaluation - Circulation Workgroup recommends moving to SirsiDynix BlueCloud. This recommendation had been made based on the functionality of each product without taking costs into consideration.